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ABSTRACT

Drawing from the experiences of Delgado Community College (DCC) in Louisiana, this manual offers guidance on choosing and implementing an institutional planning system. Section 1 offers introductory comments on planning, educators' reluctance to embrace the management systems of the private sector, and the growing recognition of the importance of planning. Section 2 examines factors to be considered in choosing a planning system, reviews reasons for planning, and describes components of the planning system. Section 3 describes the planning system developed at DCC. This section includes background information on the college, its administrative structure, its priorities and subsidiary goals and objectives, its adoption of competency-based education as the technique best suited to its objectives, and the components of DCC's comprehensive, integrated, consistent, and flexible planning system. Section IV describes the tools used at DCC to ensure that the planning system is functioning smoothly, including manuals (i.e., operational guidelines, a faculty handbook, an advising manual, an administrative procedures manual, and an organizational manual); DCC Management Issuances, which describe official policies; a comprehensive evaluation process; the annual budget; and a records retention schedule. Appendices provide sample pages from several of these documents. (UCM)

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DELGADO COMMUNITY COLLEGE

PLANNING FOR INSTITUTIONAL EFFECTIVENESS

Compiled by:
Frank W. Wright
and
Elloyse M. Garthwaite

DELGADO COMMUNITY COLLEGE

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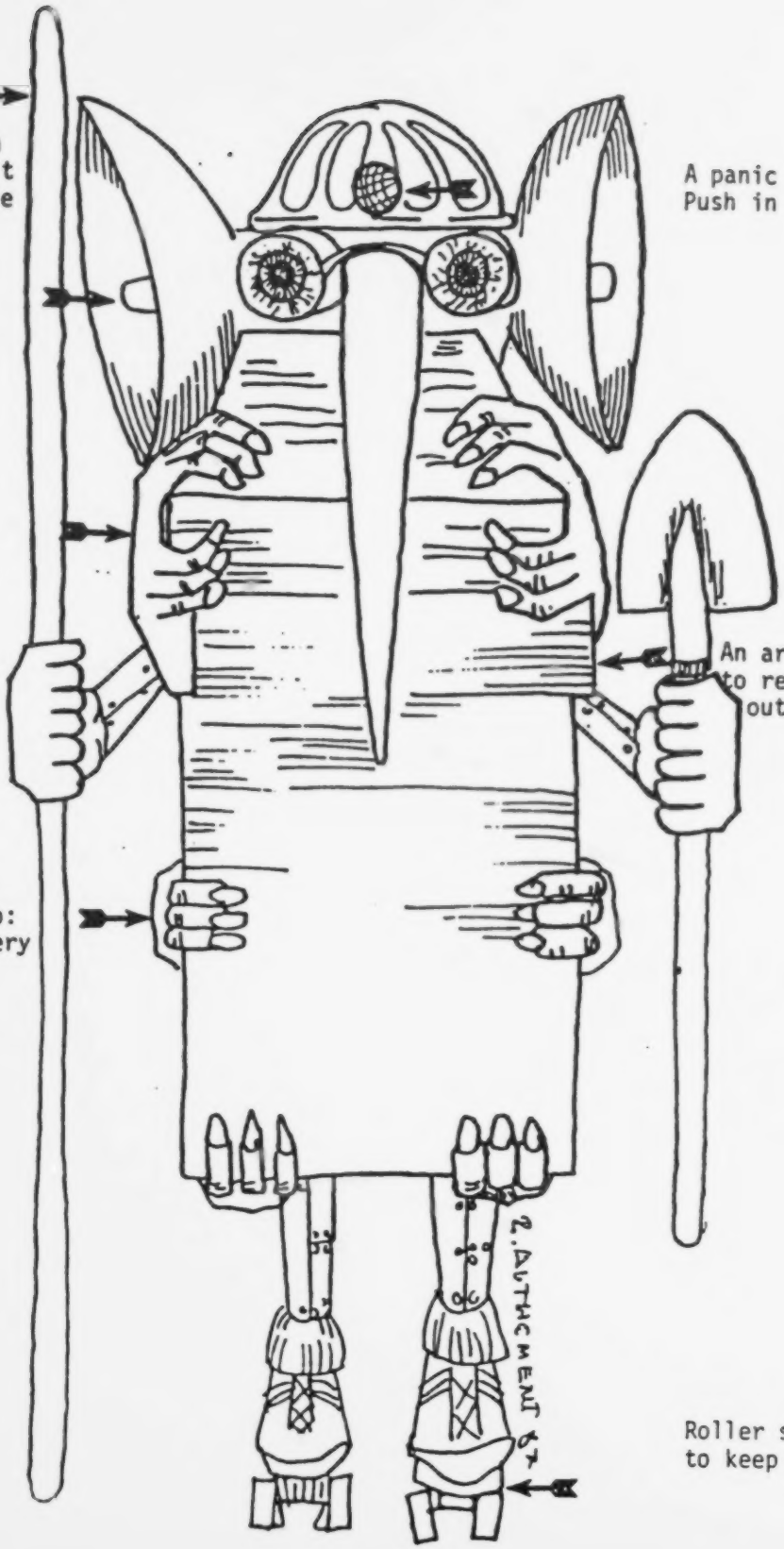
Preface

On the next page we want to introduce you to Percy Planner. This little character contains all of the qualities needed to be a perfect planner. Throughout the manual, Percy will demonstrate types of commonly used but nevertheless unsuccessful planning techniques.

Study Percy carefully noting how his unusual abilities assist in the planning process. We hope he will help you to avoid some of the problems and pitfalls of Planning.



An 11' pole to touch problems you wouldn't touch with a 10' pole

Sonar disc ears designed to hear scoop of campus gossip

Many hands so as to: "Keep hands on the situation"

Many fingers so as to: "Have a finger in every pot"

A panic button - Push in case of emergency

An armored plated hide to repel arrows of outraged colleagues

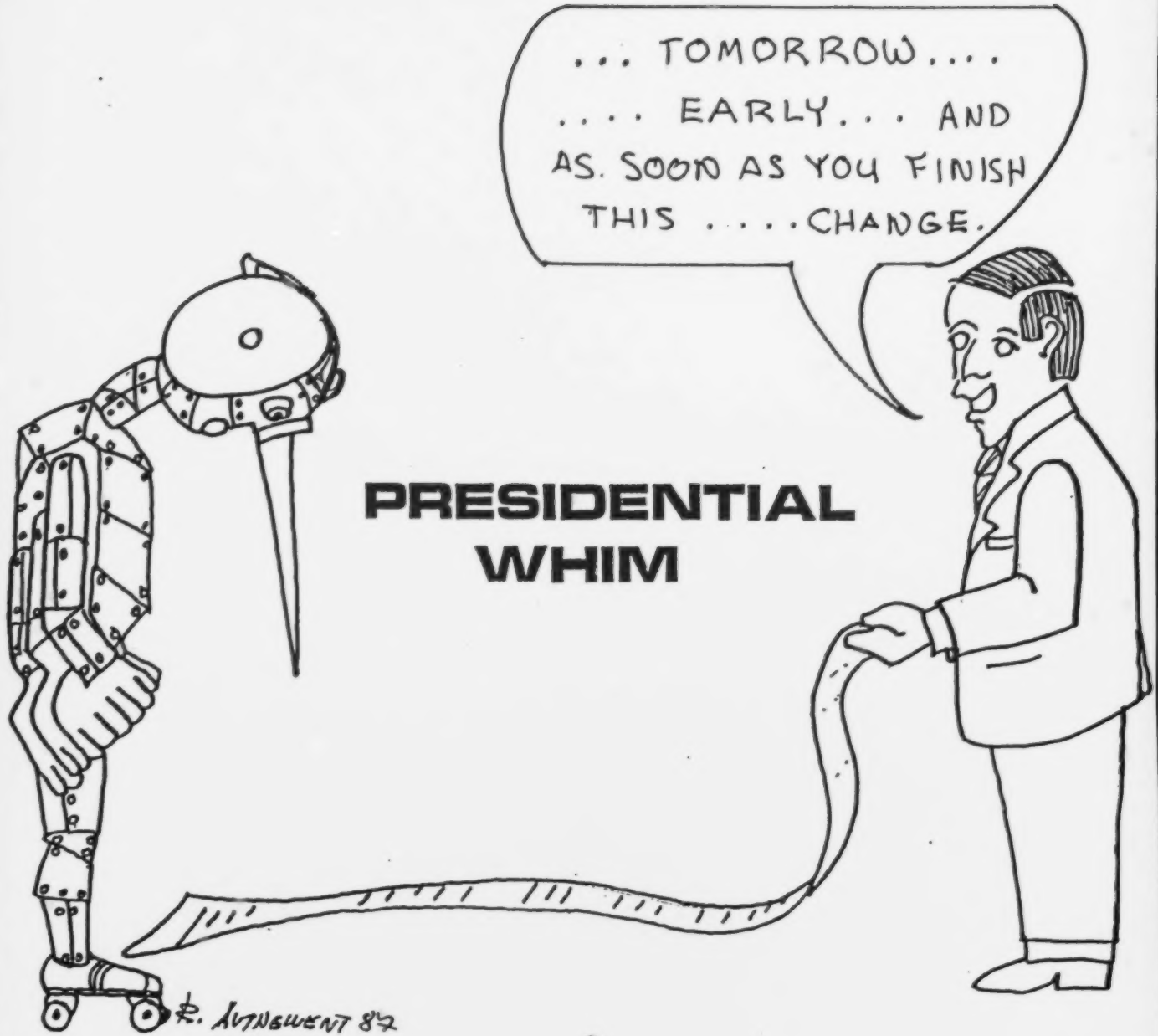
Roller skates in order to keep ahead of the pack

SECTION 1 - INTRODUCTION TO PLANNING

We wrote this manual in an effort to show how one community college has coped with the bugbear of institutional effectiveness. We don't claim to have the perfect plan but for us it has helped to bring order from disorder. In this manual we describe our plan and including sample forms to guide you should you choose to follow in our footsteps. Before we begin a detailed description of the plan we have implemented at Delgado Community College, however, let us look at the process of planning itself.

Since civilization began man has planned. Some plans he made for survival-- when and how to move the tribe into the best hunting and fishing areas. Some plans were more complex such as the aquaduct system of the Romans or the cities of the Greeks. Plato planned his Republic. We planned our own government with our Constitution. In today's modern world we seem to have a plan for everything from parenthood to funeral arrangements.

Since World War II planning has really come into its own as management systems have sprung up like toadstools after a rain storm. Budget Officers and other management personnel have embraced "Management by Objectives", have conferred sainthood on Peter Drucker and his colleagues and have happily prepared their "Gantt" and "Pert" charts as if they offered the route to Nirvana. But even with all of the furor


... TOMORROW....
.... EARLY... AND
AS. SOON AS YOU FINISH
THIS ....CHANGE.
PRESIDENTIAL
WHIM
R. AUTNEWENT 87

over management, most educators have basically managed to divorce themselves from such nonsense. True they might give lip service to the new ideas of management science. Some even succumbed to the computer technology as it swept the land in the 1960's and 1970's. Inroads were made to be sure. Financial accounts and sometimes student records went into computers, but planning and decision making were still made the old fashioned way. Academicians seem to believe that good management was a matter of "feel" or "experience" rather than being based on goals, objectives or activities. Colleges continued to be managed by:

- Presidential whim
- Tight fisted Business Managers
- Crisis
- Intuition
- Faculty with lists
- Campus gossip

It was ok to have your little pockets of planning just as long as they did not get in the way of real decision making. After all, everyone knew that planning is time consuming and given the political climate of many institutions, it is often enough just to survive an election, keep one's job and last out the year.

Then along came the 1980's and things began to change. Accountability become the watchword as costs increased and enrollments declined. If an institution was going to guarantee that students got what they paid for, then

strategic planning became a must.

But where to begin and what plan to follow? Keller tells us in his book Academic Strategy that "a college may not be ready to plan. First things first. Before strategic planning it is wise to concentrate on good management." (Keller, p. 122). Keller goes on to give us the four components of academic management.

- Administration - Where most CEO's spend 90% of their time tending to the "1000 little things". If the campus looks good, the students seem happy and the faculty are not up-in-arms; we tend to say that administration is successful.

- Management - Unfortunately things change and if an institution is going to stay on the "cutting edge" it must be ready to change, "While administration sees that things are done right, management sees that the right things are done." The President needs to take the initiative in management.

- Leadership - People run down. Presidents wear out. Routine becomes acceptable. The President needs to jolt people out of their lethargy. If the CEO can not, or will not do it, the VPAA or some other administrator should step in. Stagnation can be the death knell for any institution.

- Governance - The college is like a republic. The CEO must see that the faculty form a partnership with him to manage the academic portion of the college.

It would certainly seem to be prudent to spend a little time in preplanning assessment. Some of the questions to ask in any preplanning session include:

- Is decision making coordinated?

- Is there a shared sense of purpose and direction?

- o Is the current planning process effective as well as efficient?
- o Is there extensive participation in the process?
- o Is there consensus about the mission, role, and scope of the institution?
- o To what extent does the academic program reflect the mission, role, and scope?
- o How well understood are the educational trends affecting the institution?
- o How well do programs respond to the needs of students?

(Handbook of Academic Planning, p.11)

As the cartoon on the next page would indicate, it is very important to know where you are going before you begin. There is an old saying which says "If you don't know where you are going, you are not going to know when you get there."

We have included in the Appendix a copy of a recent article which appeared in the Community, Technical and Junior College Journal. This article summarizes the literature that is available on academic planning.

IT'S NO GOOD BEING ONE JUMP AHEAD IF YOU ARE HEADED IN THE WRONG DIRECTION!
R. SUTHERLAND '87

SECTION 2 - CHOOSING A PLANNING SYSTEM

Just as there many types of houses to live in and buildings in which to conduct business, there are many types of planning systems. Some are very simple, others are complex. Some provide for broad based participation, others obtain imput from only a few sources. Some are long range in their focus, others are more strategic.

Regardless of the design, it is better to have some planning system, rather than none at all. A balanced system is of course the best. No planning at all can lead to chaos and frustration. The old adage that "without a plan you might end up some place you didn't want to be" is very true. However, a system that is extremely tight and detailed can lead to a bureaucracy so slow that nothing gets done. A good planning system allows for the best wisdom of the institution to emerge, just enough detail for direction and enough time for implementation and evaluation.

A planning system should be chosen on the basis that those in charge of the system are comfortable with it. That is, it must be one that is understood, and the persons in charge must be capable of implementing it. Again it should be emphasized that some planning is better than no planning at all.

At Delgado Community College a Management by Objectives (MBO) system of planning was adopted. The administration

CRISIS PLANNING

believed that an MBO allowed for more participation and contained more structures for accountability and productivity than other comparable systems. Delgado's administration had earlier initiated a Competency Based Instructional System. This system emphasized course Goals and Objectives, Classroom Activities and Criteria Based Evaluation. It was determined that an MBO management and planning system had similar characteristics i.e., Goals, Objectives, Activities and Evaluation. As the two systems were very similar in nature, it was decided that a common philosophical base for instruction and management would provide a consistency in the operation of the college.

Regardless of the type of system you choose, whether long range or strategic, the first outcome must be that the system show results. If goals are reached under mutually agreed on conditions, staff, budget, and facility considerations, then the system has been successful for the needs and purposes of the institutuion.

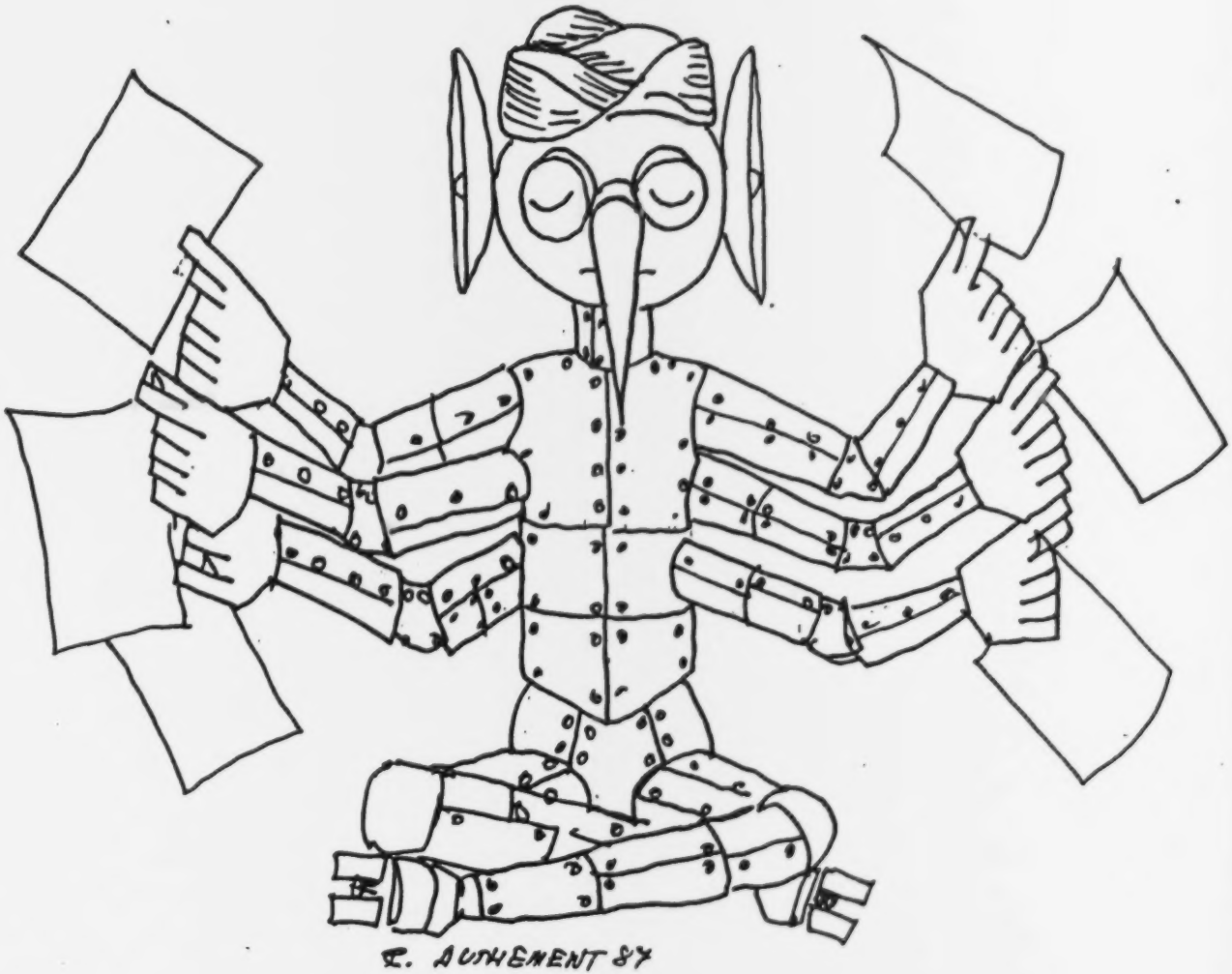
REASONS FOR PLANNING

If planning takes place it will make your institution more effective because of the following reasons:

- o ESTABLISHES DIRECTON: The process of goal setting will provide your organization or institution with a general road map of what you wish to accomplish

- o ASSIGNS RESPONSIBILITIES: Good planning clarifies the role each member is to play in accomplishing the Goals and Objectives of the institution

INTUITION



- o ALLOCATES RESOURCES: Planning forces the question, "what will it take to make the plan work" to be answered.

- o INSURES FOLLOW THROUGH: A simple and clear path makes it easier for each person to carry out responsibilities

- o ALLOWS FOR INPUT: A good plan is easy to implement if each member of the institution feels that they have made a contribution. In effect it becomes their plan

- o ACCESSES PROGRESS: A good plan provides for periodic monitoring to determine if the plan is working.

- o ANALYZES RESULTS: "How well are we doing", and "have we accomplished our goal" are two very important questions. If there is no plan these questions may not get answered.

COMPONENTS OF THE PLANNING SYSTEM

The components of the Planning System are described below. These components are common to most planning systems although they may appear under different titles and the Planning System you choose may not use all of the components.

- o Mission or Purpose Statement

  General statements of the purpose and educational intentions of the college. This statement clarifies the reason for the college's existence and describes the types of programs that serve the educational needs of the community.

- o Institutional Priorities

  Institutional Priorities are general, global statements that embody the College's overall responsibilities in fulfilling its mission and educational philosophy. With the exception of events of significant magnitude which may be

added as Priorities, only minor changes are made in the Insitututional Priorities unless the mission of the College is changed.

- o Goal Statements

  Goals are specific statements reflecting the areas to receive attention by the major operating units and provide the overall structure for developing Objectives and Activities.

- o Objectives

  Objectives are more detailed statements that are designed to accomplish the Goals and are the basis for the development of Activities.

- o Activities

  Activities are measurable tasks that support the Goals and Objectives. They are planned, budgeted, and implemented by the operating units.

- o Status Reports

  The effectiveness of the planning system is best measured by the success of each major operating unit in achieving its Goals and Objectives. Therefore, monitoring is an important component of the planning system.

- o End-of-Year Reports

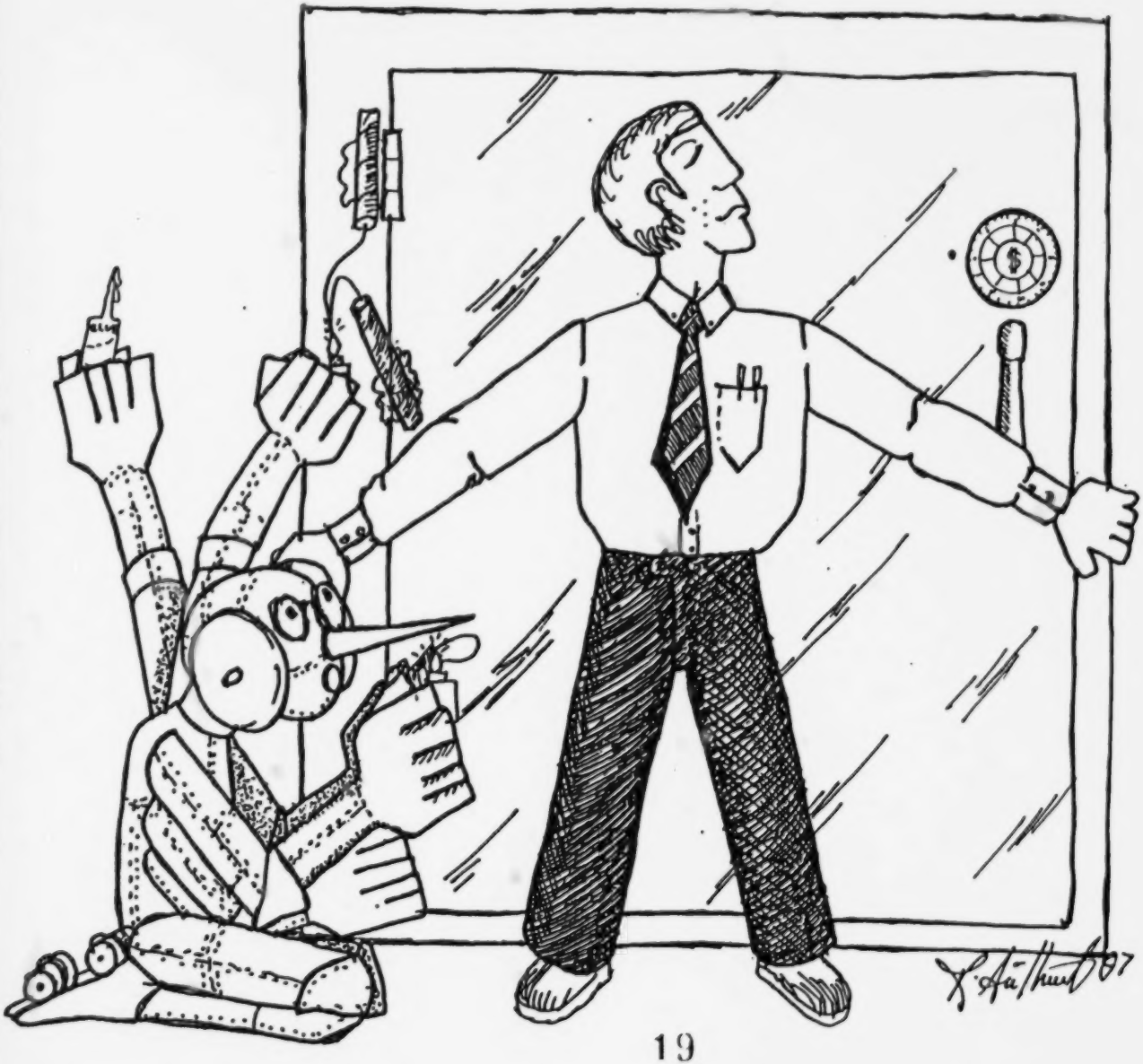
  End-of-Year Reports are submitted by operating units to appropriate Deans or Vice Presidents. The purpose of these reports is to determine the overall effectiveness of operating units in accomplishing their planned Objectives and Activities.

  Information in the operating units' End-of-Year Reports is summarized by appropriate administrators during their End-of-Year presentations to the President and Executive Council at the Summer Retreat.

TIMETABLE

To keep the elements of the planning system in proper prospective, it must be understood that the College is

PLANNING WITH A TIGHT BUDGET



working concurrently on two sets of planning activities; i.e. implementation of current year's activities, while developing and budgeting for next year's activities. For this reason, the Planning System Timetable has been divided into the following two sections.

Implementation of Current Year's Activities

August 15	Vice President for Business Affairs distributes approved budget for academic year to budget heads.
September 15	Faculty and staff members submit Plans of Action (part of Performance Evaluation System) to supervisors.
November 1 and February 1	Vice Presidents and Campus Deans submit Status Reports on current activities to Vice President for Academic Affairs.
May 1	(Summer Retreat) Vice President and Campus Deans make End-of-Year Presentations to President and Executive Council.
June 1	Vice Presidents and Campus Deans submit End-of-Year Reports to Vice President for Institutional Programs.

Development of Next Year's Activities

November 1	President and Vice President for Academic Affairs issue Institutional Priorities for the following year.
January 15	Vice Presidents (and Campus Heads) Develop Goals and Objectives for their operating units, and
February 15	Submit these Goals and Objectives to Vice President for Academic Affairs.
March 1	Vice President for Academic Affairs returns Goals and Objectives with recommended changes to Vice Presidents, Campus Heads, and/or other top level administrators.
April 1	Vice Presidents and Campus Heads submit to Vice President for Academic Affairs proposed

	Activites with budgets to support approved Goals and Objectives.
May 1	(Summer Retreat) President and Executive Council review and approve Activities and budgets for next academic year and submit them to Vice President for Business Affairs.
June 1	Budget development process begins.
June 15	Finalized budget reviewed by Executive Council.
July 1	Delgado's budget submitted to State of Louisiana, Division of Administration.

Conclusion: Because of outside influences and internal differences, a single planning model will not work in every institutional setting without some modification. There are many models to choose from, and it is not all that difficult to create your own. The planning function, in its basic form, is no more than clarifying your purpose, gathering the people who will implement the plan and asking for their input, deciding who will perform the necessary tasks, discuss alternatives, select the best alternative, allocate the resources, put the plan and the tasks in writing, and evaluate the results. If you follow this simple plan, you will be amazed at the results.

FACULTY WITH LISTS

SECTION 3 - INSTITUTIONAL PLANNING

In this section we want to describe the planning system which we have developed at Delgado Community Collge.

Delgado Community College is an urban institution located in New Orleans, Louisiana. Its' 2 established campuses and Community Projects area serve approximately 6-8 thousand students per semester.

The College was established in 1909 by a bequest from Jamaican-born sugar planter Isaac Delgado to found an institution "to provide a trade to white boys over twelve" (or those who had completed the eighth grade). It opened in August 1921 under the name Isaac Delgdo Central Trades School. During the first school year, 1300 men and boys attended, beginning a three-year intensive training cycle in cabinet making, plumbing, and tailoring. By 1961, at the time of its 40th anniversary, over 40,000 students had been trained by the institution. In its 64-year history, Delgado Community College has undergone three official name changes, each reflecting a shift in the purpose of the institution from that of a trades school to that of a comprehensive community college for people of all ages, races and nationalities.

The name Delgado Community College was officially adopted in 1980, and the role of the college expanded

accordingly. At that time, Delgado made a commitment to improve instructional programs and to provide alternative instructional activities to accommodate the diverse learning styles of all the students. Without diminishing its occuptional and technical offerings, the institution placed more emphasis on general education and rejuvenation of its Community Projects unit. It also created a Developmental Studies Division to assure proper placement of new students and to provide preparation for college-level courses.

In its role as a comprehensive community college, Delgado offers:

- traditional degree and certificate programs, including a wide range of courses transferable to senior colleges and universities, in specific technical and occupational fields from which students can select from a variety of programs in such areas as engineering technologies, health services, business studies, applied arts, and computer science.
- a variety of courses ranging in duration from one week to one semester to students wishing to upgrade existing skills.
- a large selection of courses which students may take "just for fun".

At the time that Delgado's evolution from a trades school to a comprehensive community college was concluded and in order to ensure that future development of the college would proceed in an orderly fashion consistent with community college philosphy, work was begun on a planning system. Although this system has undergone a number of modifications through the years, the components have remained essentially the same.

Delgado's planning system was designed to ensure that all segments of the institution play a role in charting the course of the college and in determining what activities will be undertaken to keep the institution on this course. Thus the system includes components at the institutional, operating unit, and individual levels.

The foundation upon which Delgado's entire planning system rests is a set of institutional priorities. These priorities are broad, general statements derived from the college's purpose statement and are determined by the President in consultation with the Executive Council. Although the priorities are approved prior to the start of each academic year, in practice they change but little from year to year. Thus in effect they form the college's long-range goals.

The priorities as published in the current Operational Guidelines are as follows:

I. Instructional programs: Provide an instructional program committed to quality and successful student achievement.

II. Faculty: Provide opportunities and incentives for faculty and academic staff to develop professionally.

III. Students: Provide educational and support programs within an open-door context; actively service students from all academic levels, nontraditional ages, lower socio-economic backgrounds, and those deficient in basic skills.

IV. Administration: Provide management and planning system which ensures productivity, fiscal responsibility, and accountablity in the use of public funds.

V. Facilities: Provide and maintain an educational facility which will be attractive, safe, and flexible, as well as one which will enhance student learning and achievement.

VI. Finances: Provide for the utilization and distribution of all available financial resources to strengthen academic and support programs within established budgets.

VII. Community Projects: Provide programs to meet the assessed needs of the community and its residents through community involvement and outreach activities.

VIII. Institutional Advancement: Provide a positive external focus to communicate the reality of quality to the college's public--prospective students and their families, alumni, business and industry, the Board of Trustees, the Legislature, other academic institutions--and to ourselves.

Closely related to the priorities are the campus and major service units goals and objectives. These statements address more immediate concerns and are specific to describing outcomes that--when achieved--will contribute to the institution's attainment of its priorities.

Once insitutional priorities have been established, the Vice-Presidents and Campus Deans develop goals and objectives for their systems unit or campus. In developing these goals and objectives, suggestions are sought from all operating levels within the campus or unit and from external sources.

The next step in the process requires that each operating unit--systems or campus--develop a list of activities that will be undertaken to support the goals and objectives. Budgetary requirements are included for each proposed activity. When these activities are approved by the

President and the Executive Council, they are forwarded to the Vice-President for Business Affairs, who then begins the process of budget development. Thus planned and approved activities determine the arrangement of the institutional budget, rather than the oppposite practice.

Once goals, objectives, and operating unit activities have been established, each individual employed by the college prepares an Individual Plan of Action describing his/her activities during the coming year and indicating how these activities will contribute to the attainment of his/her unit goals and objectives. This Plan of Action is discussed with the individual's supervisor and--once approved--becomes the basis for the employee's yearly activities.

At the conclusion of the academic year each unit prepares an End-of-Year Report describing accomplishments and evaluating the extent to which activities have been completed Although this report is intended primarily as an assessment document, it plays an important role in the planning process. Both unattained objectives and the reasons for non-attainment are examined, and, should the objective still appear to be worthwhile, plans are made to eliminate the obstacles and to pursue the objective during the coming year. Thus information derived from the End-of-Year Report serves as one source of planning for the following year.

While individual plans of action are no longer a part of the planning process per se, information obtained from review of these plans is used by the operating unit in formulating

plans for future unit activities and for staff development.

To assist the unit in preparing the End-of-the Year Report, status reports documenting progress toward completion of operating unit activities are required at intervals throughout the year.

Facilities planning is guided by the Delgado Master Plan. This document, prepared by a firm of acrhitectural consultants and approved by the State Board of Regents in 1977, specifies modifications in the physical plant that were expected to be undertaken through the year 1988. In the developemnt of this plan, future population and enrollment trends, programmatic changes, repair/replacement needs, and anticipated revisions were taken into consideration.

Since planning is so important to the orderly progress of an institution such as Delgado, several units have been established to coordinate and support planning activities.

OFFICE OF MANAGEMENT AND PLANNING

The office of Management and Planning is charged with coordination of planning activities for the college and with assisting in the proper maintenance of records essential to the planning process. This office develops and publishes schedules, maintains and accumulates copies of approved plans, and has developed record retention schedules for all official college records. These schedules have been approved by the State of Louisiana Records Office and are the college's legal authority for disposing of old records.

INSTITUTIONAL RESEARCH AND DATA MANAGEMENT

The offices of Institutional research and Data Management collect and maintain data that are essential to the planning process. The Office of Institutional Research provides the President and his Executive Council with reports and doucments to be used in the Planning process.

As part of the commitment of Delgado Community College to its role as a comprehensive community college, not only has the college established priorities and goals that are consistent with the community college philosphy and toward which all its activities are directed, but also Delgado has developed procedures for assessing the extent to which its priorities and goals have been attained and its objectives have been met.

Each of the institutional priorities and subsidiary goals, objectives and activities plays an important role in guiding the college toward fulfiling its mission. However, it is the first priority provision of a quality instructional program, that is Delgado's very raison d'etre. For this reason the college has identified five overall competencies toward which the institutional program is directed.

COMMUNICATIONS

A Delgado graduate has the knowledge and skills necessary to communicate effectively in reading, writing, speaking, and listening and computation.

VALUES/DECISION-MAKING

A Delgado graduate can identify the major values and issues faced in daily life in one's own and other cultures and can make decisions based on values.

ANALYTICAL/PROBLEM SOLVING ABILITY

A Delgado graduate has knowledge and skills to logically analyze problems and make effective judgments.

AESTHETICS/SELF EXPRESSION

A Delgado graduate is aware of and values his emotional life through some form of artistic expression.

AREA OF SPECIALIZATION

A Delgado graduate is competent in a chosen field and/or curriculum.

Just as it was necessary to develop goals, objectives and activities to give greater specificity to the institution's priorities, it was also necessary to develop criteria by which student attainment of the above outcomes could be measured. Competency-based education (CBE) was selected as the technique to be used for achieving this end.

Under the CBE plan adopted by Delgado, faculty members--assisted by staff from the Curriculum Development Office--develop competency statements for each program in Delgado's curriculum and for each course within the program. These statements are reviewed by the CBE Task Force, which is composed of faculty and administration from various academic units of the college. The statements are revised as necessary and are then presented to the Vice-President for Acadamic Affairs for approval. Thus a diversity of faculty members and administrators participate in developing both program and course competencies.

Delgado's first efforts toward comptency-based education occurred in 1977 when receipt of a federal grant enabled the college to pursue the Program for Achievement of Competency Education (PACE). Under Project PACE, competencies were written for courses in five academic areas.

As of the close of the Summer Session 1985, competencies had been written for approximately 45 percent of the

institution's programs and 40 percent of its courses. Completion of the CBE project is expected to require an additional three to five years.

While the conversion to CBE is only partially complete, the college does not allow any course to be taught unless attention has been given to instructional aims. The current Faculty Handbook requires that each faculty member develop a syllabus for each course he or she teaches and that the syllabus contain both course goals and measurable objectives. In this way the college is ensuring that even those courses that have not yet been converted to a CBE format will have clearly stated outcomes.

Delgado's assessment process is based upon the belief that attainment of goals can best be demonstrated by evaluating the institutions' success in achieving the stated objectives under each goal, and that objectives in turn are best evaluated by assessing the extent to which constituent activities have been accomplished. For this reason, it is the specific activities of each unit within the college that are given careful scrutiny in the assessment process.

As previously explained, at the beginning of the academic year each individual develops a Plan of Action and each unit develops Divisional/Operation Unit Activities that enumerate the specific activities it will undertake in order to achieve the institutional goals and objectives. At the close of the year each unit prepares an End-of-Year Report in which it documents the extent to which each activity has been

performed. Evaluation comments include problems encountered, reasons for noncompletion of an activity, and recommendations for revising institutional goals and objectives. This End-of-Year Report is reviewed by unit-, campus- (if appropriate), and systems-level administrators, and then forwarded to the President. Ultimately these reports serve as the basis for assessing the extent to which unit and institutional goals and objectives have been attained. In addition, information gained from these reports is used by the President and the Executive Council in establishing goals and objectives for the following year.

Just as the instructional program is deemed important enough to warrant specialized goals, objectives, and comptencies, so too assessment of the instructional program requires that specialized techniques be employed.

In the fall of 1981, core curriculum requirements were established for all Delgado's degree and certificate programs. These requirements include a minimum of two semesters of college-level English and one semester each of humanities, social sciences, natural sciences, and mathematics. In addition, faculty are encouraged to require both written and oral exercises, such as reports, essays, demonstrations, and speeches, in each of their courses. Thus by successful completion of the core curriculum requirements a student is presumed to have demonstrated comptency in communications, values/decision-making, and analytical/problem solving.

Assessment of a student's comptence in the area of aesthetics/self expression is enevitably a difficult task. The college provides a number of artistic/cultural opportunities during the academic year. Development of students' aesthetic awareness is one of the objectives of the humanities requirement in the core curriculum, and the emphasis on writing-across-the-curriculum provides further opportunities for disciplined self-expression.

With regard to the fifth outcome, ie., competency in an area of specialization, methods of assessment include students' performance in specialized courses and supervisors' submission of End-of-Year Reports. In addition, the college assesses the quality of its programs by accreditation by outside agencies and student performance on licensure examinations, by recommendations of advisory committees, and by an ongoing institutional program review project.

Delgado's most comprehensive means of assessing program outcomes is the Program Review project begun under the aegis of a Title III grant in the fall of 1982. Under this project a committee, representing both campuses and composed of faculty from the target program, works under the direction of staff of the of the Office of Curriculum Development to complete the program review questionnaire. This questionnaire elicits information regarding eight different aspects of the program: (1) revelance and fit, (2) curriculum, (3) market and student demand, (4) faculty quality, (5) satisfaction and performance of graduates, (6)

facilities and equipment, (7) expenses/income, and (8) indirect benefits. Since item five--satisfaction and performance of graduates--is crucial to the assessment process, a supplemental questionnaire requesting information about program strengths and weaknesses, overall satisfaction, and on-the-job performance of graduates is circulated to a sample of alumni and employers.

Each program review committee uses information obtained from the questionnaires along with other relevant material (course syllabi, faculty resumes, etc.) to assess the strengths and weaknesses of the program and to prepare appropriate recommendations. These recommendations, together with completed questionnaires, comments, and supplemental materials from the committee's report, are then forwarded to the appropriate Dean of Instruction for his or her consideration. The report ultimately reaches the Vice-President for Academic Affairs, who studies it and decides what action is to be taken.

Since community expectations and job market demands are continually changing, it is obvious that programs must be subjected to review at regular intervals. For this reason, the Executive Council has developed and approved a program review schedule under which college programs will be reviewed at least once within a five-year period. Under certain circumstances, such as rapidly changing labor market demands or financial exigencies, a program may be reviewed more frequently than once every five years.

Delgado's planning system is comprehensive, integrated and consistent while at the same time remaining flexible. Since the system is fairly complicated, it takes a good communication network to make it work. In the next section we want to describe some of the tools we used to ensure that the planning system operates smoothly.

SECTION IV - TOOLS OF THE TRADE

A. Manuals

Support from the Planning System comes in large part from in-house manuals which serve to convey information to faculty, staff and administration. The first four manuals represent the core of this communication channel. Each manual has a Management Instruction that established it. We have included one (at the end of this section) as a sample with the first manual. We have also included a Table of Contents from each of the first 4 manuals.

Operational Guidelines is published annually and contains most of the dated materials. By having one publication which contains most of the dated materials, it ensures that only one manual will have to be completely revised each year. Other manuals can be up-dated by sections when needed.

Faculty Handbook is given to all faculty members and is up-dated by sections when needed. Figure 3 gives a sample Table of Contents for the Faculty Handbook.

The Advising Manual is also given to every full time faculty member to ensure consistency in advisement of students. A sample Table of Contents is shown in Figure 4.

Academic Procedures Manual, also distributed to faculty and staff, contains most of the academic policies of the institution. Figure 5 shows a representative Table of Contents.

The Organizational Manual is a two volume work which contains the functions and job descriptions of all administrative offices as well as divisional and service units. The purpose of this manual is to clarify and communicate organizational relationships and to ensure college-wide consistency in all matters relating to campus and systems operations. It identifies each administrative unit of the college and contains three specific sections: (1) a Unit Charter that gives information on the units' functions, responsibility, authority, and managerial relationships; (2) a Unit Organizational Chart; and (3) Individual Job Descriptions.

B. DCI's

Delgado Community College Management Issuances (DCI's) are documents which describe official policies of the institution. Each one is numbered, states the effective date, and sites the originating organization. These issuances contain policies regarding employment, due process, tenure, governance of faculty and administrative procedures. The complete issuance on DCI's is given in the Appendix of this manual.

C. Evaluation Process

All employees of Delgado Community College are evaluated on an annual basis.

Classified employees are evaluated by their supervisors following the guidelines as put forth by the state Civil Service Commission.

The process for evaluating all unclassified employees is published in the Performance Evaluation Manual which originated in fall 1984 and is distributed to all faculty members. The manual provides a statement of the criteria by which the faculty members will be measured and includes the following components of the faculty evaluation process:

1. A Plan of Action in which the faculty member indicates his role in assisting the institution, his campus, and his division to meet their goals and objectives, and which is to be used in evaluating the performance of the faculty member.

2. A supervisor's evaluation with the following components:

   a. A review of classroom activities, instructional activities, relationships to students, service to the division, service to th college, and service to the profession.

   b. An evaluation summary that narrates the faculty member's strengths, the area in which improvement is needed, the comments and suggestions of the supervisor, and a rating of the faculty's member's overall effectiveness ("needs improvement," "good," or "excellent")

   c. A faculty member's response form, which provides an opportunity for the faculty member to reply in writing to any statement made on the supervisor's evaluation

3. A self-evaluation by the faculty member

4. A student evaluation of instruction

5. A peer evaluation, which is not to be considered as a part of the final evaluation, and is intended only for the benefit of the instructor.

6. An evaluation of the supervisor by the faculty member

The manual also contains forms for the evaluation of

administrators. These include (1) Self-Evaluation, (2) Administrative Employee Performance Evaluation, (3) Appraisal Worksheet and Assessment Criteria, (4) Plan of Action, (5) Evaluation Summary, (6) Employee's Response to Summary, and (7) Upward Evaluation. The evaluation criteria -- job knowledge, quality and quantity of work, organizing and planning, leadership, decision making, interpersonal relations, initiative, dependability, communication skills, stability, and self-development -- lead to a reasonable evaluation of an administrator's effectiveness.

Evaluation of programs has already been described in the section on Planning. Included in the appendix is a copy of an article written by the two Delgado Administrators who were primarily responsible for designing and implementing the Program Review process.

D. Budget

Development of the annual budget is an important component of the planning system. The DCI on the planning systems shows the relationship between educational planning and budgeting. (See Appendix) This DCI requires all units to translate published goals into annual ambitions and activities consistent with the mission of the college and to project the thrust of the college for five to ten years in the future.

The instructional budget is developed by deans, working cooperatively with division chairman and other unit heads provide leadership and act as lisison between faculty and the

deans during the budget preparation process. The order in which the budget is developed is as follows:

1. The division chairman consults with faculty concerning departmental needs.

2. The chairman assimilates and reviews all faculty requests including equipment, materials and supplies, contractual services, and travel.

3. The chairman or unit head justifies all requests for additional personnel, equipment, supplies, and other budgeting costs in terms of enrollment and departmental goals.

4. The chairman or unit head presents all data with supporting justification to the Dean of Instruction or Campus Dean.

5. The Dean of Instruction (or Director) reviews and approves divisional/service unit requests.

6. The Campus Dean assimilates all divisional/service unit requests.

7. The Campus Dean reviews and evaluates all proposed expenditures in relation to established goals, objectives, and priorities for each department.

8. The Campus Dean presents and justifies the prepared budget to the Vice-President for Academic Affairs and the Vice-President for Business Affairs.

9. The Campus Deans make recommendations to the Vice-Presidents regarding priorities in the event funds are not made available to meet the full budget requests.

E. Records Retention Schedule

In 1984 all campus and systems records were inventoried. This inventory identified records created and maintained by each operational unit. Based on this inventory, record retention schedules were developed.

Record retention schedules are an integral part of Delgado's Records Management Program because they identify

vital and historical records which must be maintained and provide the legal authority to dispose of records after they have met their required retention periods. The Delgado Record Retention Schedules have been approved by the Louisiana Archives and Records Service, Secretary of State, and are the legal authority for the systematic disposition of Delgado records.

DELGADO COMMUNITY COLLEGE	NUMBER: DM 1210.2E
	EFFECTIVE DATE: August 18, 1986
	ORIGINATING ORGANIZATION: AA01

MANAGEMENT INSTRUCTION

SUBJECT: DELGADO COMMUNITY COLLEGE OPERATIONAL GUIDELINES 1986-87

1. PURPOSE

To publish basic operational and planning information for the 1986-87 academic year.

2. SCOPE AND APPLICABILITY

The guidelines contained in this manual apply to all campuses and operating units of the Delgado Community College.

3. BACKGROUND

Delgado Community College Operational Guidelines are issued to reaffirm the College's mission, educational philosophy, and expected student outcomes, and to publish institutional priorities for 1986-87 academic year. In addition, the Operational Guidelines provide meeting dates and memberships of Delgado's administrative councils and committees, academic calendars, final examination schedules, and a planning calendar of major activities to be accomplished during the academic year.

Delgado employees are expected to participate to the fullest in all planned activities which support the institutional priorities and to adhere to the timetable published in the planning calendar.

4. CANCELLATION

DM 1210.2D, Delgado Community College Operational Guidelines for 1985-1986 dated August 19, 1985.

Harry J. Boyer
President

Distribution:
SDL A, B, C, D, E, F

cc: Board of Regents
Board of Trustees
President, Faculty Senate

DELGADO COMMUNITY COLLEGE
OPERATIONAL GUIDELINES 1986-87

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Pages 48 - 53 contained photocopies of copyrighted articles which have therefore been removed. The articles were as follows:

Friedman, Frank. "The Successfull Planning System". Research Reports. AACJC Journal, Feb/Mar 1987. pp. 48-49.

Garrity, Raymond; Findlen, George. "Program Review: A Model Instrument and Process". Journal of Staff, Program, & Organizational Development. Vol 3, No. 3, Fall 1985. pp. 81-84.

DELGADO COMMUNITY COLLEGE

NUMBER:	DCI 1220.1
EFFECTIVE DATE:	November 1, 1979
ORIGINATING ORGANIZATION:	AA01

MANAGEMENT INSTRUCTION

SUBJECT: DELGADO COLLEGE MANAGEMENT ISSUANCE SYSTEM

1. PURPOSE

To establish policy, types of issuances, responsibilities and general procedures governing the Delgado College Management Issuance System.

2. SCOPE AND APPLICABILITY

This instruction applies to all organizational elements of the Delgado Community College System.

3. POLICY

a. Management issuances of general college-wide interest will be documented as part of the Delgado College Management Issuance System.

b. Issuances will be clear, concise and to the point on matters of college-wide interest which:

(1) Establish or define policy, guidelines, or enunciate program and institutional management decisions.

(2) Effect formal delegations of authority.

(3) Assign functional or operational responsibility and establish organizational structure.

(4) Provide information that college management desires to have wide dissemination.

4. TYPES OF ISSUANCES

a. DCI (Delgado College Instruction) will be used to publish policy statements, delegations of authority, program or institutional management decisions; general guidelines or procedures; other college management information of a continuing nature; and formal agreements containing material within the above scope.

b. DCA (Delgado College Announcement) will be used primarily to disseminate information of a temporary or one-time nature and may be used to announce the provisions of new or revised management instructions pending publication of DCI's or DM's.

4. c. DM (Delgado College Manual) will be used when there is a need to issue a large volume of specialized material, proceduralized information of a continuing nature which is best published in manual form; or to group for ease of reference and referral a number of management issuances in the same subject area.

d. Organizational issuances are not part of the official Delgado College Issuance System but may be used within the college for internal instructions which implement college-wide issuances or for procedures governing internal operations. Signature authority of these organizational issuances will be determined by the head of the issuing organization. In all cases, such internal issuances will be consistent with the Delgado College Issuance System.

5. SIGNATURE AUTHORITY

DCI's, DCA's, DM's will be approved and signed by the President or Vice President for Academic Affairs and Provost. DCA's of an exclusively functional nature or pertaining to one campus may be signed by the responsible official, subject to coordination with the President or Vice President for Academic Affairs and Provost.

6. RESPONSIBILITIES

a. The Delgado College President or Vice President for Academic Affairs and Provost will approve all Delgado College management issuances.

b. The vice presidents, assistant vice president, and executive deans are responsible for the initiation, draft, coordination, final preparation, and retention of document case files of management issuances falling within their respective areas of responsibility. Offices initiating an approved Delgado College management issuance will establish an internal system for periodic review, update, and cancellation of issuances no longer required.

c. The Delgado College Issuance Control Officer is responsible for operational management of the issuance system to include review of new or revised management issuances to avoid duplication or overlap; adherence to format and good editorial standards; maintenance of master reference file of all issuances; numbering; issuance of current indexes, and distribution of issuances.

7. GENERAL PROVISIONS

a. Any organizational unit of the college recognizing a need for a directive may request the responsible vice president, assistant vice president, or executive dean to investigate and, if required, initiate instruction or appropriate directive.

b. Any major differences arising during the coordination process which cannot be resolved will be referred to the President or Vice President for Academic Affairs and Provost for decision.

November 1, 1979 DCI ~~1~~220.1

7. c. The numbering of Delgado College management issuances will be compatible with the Subject Classification Table for Delgado College Management Issuances contained in Annex A. Numbering details and general format for issuances are included in Annexes B, C, D, and E.

d. Management issuances will not include:

(1) Day-to-day correspondence.

(2) Specific case or transaction documents and their supporting papers.

(3) Specific task/project assignments, operational directives, or approved documents.

(4) Technical documentation such as specifications, drawings, maps, parts lists, and scientific and technical reports of projects.

(5) Brochures or pamphlets approved by management for informational release to the general public. However, documents which prescribe the standards, formats, and procedures for the above excluded communications DO fall within the definition of management issuances.

(6) Periodic advisory or informational material of short term value.

8. CANCELLATION

DCI 1120.1 dated May 7, 1979, Subject: Delgado College Issuance System.

Harry J. Boyer
President

Attachments:
Annex A - Subject Classification Table
Annex B - Format for Delgado College Instruction
Annex C - Format for Delgado College Announcement
Annex D - Format for Delgado College Management Delegation
Annex E - Procedures for Delgado College Manuals
Annex F - Publication of Delgado College Charters

Distribution:
SDL A, B, C, D, E,F

cc: Board of Trustees
President, Faculty Senate

DELGADO COMMUNITY COLLEGE

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1124 Organization - Other

1130 Mission, Role, Scope
1131 College Goals and Objectives

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1835 Atypical Courses
1836 MEGIS Reports

1900 EDUCATIONAL AND INSTITUTIONAL STATISTICS

1910 Institutional Statistics
1911 Student Profiles

1920 Educational Studies
1921 Needs Assessments
1922 Papers for Presentation

1930 Literature on Community Education

1940 Information and Statistics--Other Institutions

2000 PERSONNEL

2010 Basic Concepts and Definitions

2020 Personnel Policy Formulation
2021 Evaluation of Personnel Programs

2030 Personnel Records and Processing
2031 SOT Personnel Transactions (Board Sheets)
2032 Release of Personnel Information

2100 EMPLOYMENT

2110 Employment Applications
2111 Notices of Position Vacancies
2112 Personnel Transactions
2113 Recruitment and Selection

2120 Unclassified Personnel
2121 Administrative Positions
2122 Faculty
2123 Summer Employment

2130 Classified Personnel
2131 Seasonal Employees

2140 Contract Personnel
2141 Part-Time Contracts
2142 Contract for Personal Services
2143 Contract for Professional Services
2144 Consultants

2150 Tenure

2160 Promotion and Internal Placement
2161 Transfers

2170 Job Retention
2171 Reduction-in-Force
2172 Reemployment Rights

2200 EMPLOYEE PERFORMANCE AND UTILIZATION

2210 Employee Development

2220 Performance Evaluation

2230 Employee Recognition and Incentives

2300 POSITION CLASSIFICATION AND PAY

2310 Position Classification and Job Evaluation
2311 Position Descriptions

2320 Pay and Salary Schedules
2321 Promotion-in-Rank
2322 Merit Salary Increases

2400 ATTENDANCE AND LEAVE

2410 Absence and Leave
2411 Sabbatical Leave

2420 Released Time

2500 PERSONNEL RELATIONS AND SERVICES

2510 Employee-Management Relations
2520 Employee Organizations and Activities
2521 UFCT--United Federation of College Teachers
2522 American Federation of State, County, and Municipal Employees

2530 Conduct of Employees
2531 Political Activities of Employees
2532 Employee Investigations
2533 Discipline and Adverse Actions
2534 Employee Grievances and Administrative Appeals

2540 Services to Employees
2541 Credit Unions and Banking Facilities
2542 United States Savings Bonds

2600 INSURANCE AND ANNUITIES

2610 Injury Compensation

2620 Retirement and Social Security

2630 Unemployment Compensation

2640 Group Life Insurance

2650 Group Health Insurance

2700 TRAINING PROGRAMS

2710 Workshops and Seminars
2711-9 (Reserved for Assignment to Specific Workshops and Seminars)

2720 Staff Development Activities
2721-9 (Reserved for Assignment to Specific Staff Development Activities)

3000 FINANCIAL MANAGEMENT

3010 Policies and Objectives of Financial Management

3020 Systemwide Coding Structure
3021 Program Coding

3030 User Charges

3040 Miscellaneous Financial Matters

3100 BUDGET FORMULATION AND EXECUTION

3101 General

3110 Legislative Planning Budget
3111 Budget Call (Instructions and Guidelines)
3112 Preparation and Submission of Estimates

3120 Operations Budget
3121 Budget Call (Instructions and Guidelines)
3122 Preparation and Submission of Estimates

3130 Capital Outlay Budget

3140 Legislative Review and Budget Approval

3200 ACCOUNTING

3210 General Funds

3220 Accounts Receivable
3221 Student Financial Aid
3222 Student-Employee Fees
3223 Other

3230 Accounts Payable
3231 Vendor Files
3232 Student Financial Aid
3233 Student Refunds

3240 Payroll
3241 Classified and Unclassified Employees
3242 Part-time Contracts
3243 Student Work Study
3244 Salary Information
3245 Payroll Deductions

3250 Travel Expenditures

3260 Property Accounting
3261 General
3262 Land
3263 Site Improvement
3264 Buildings
3265 Equipment

4000 EXTERNAL RELATIONSHIPS

4010 Cooperative Projects
4011 LSU Committee--Transfer of Credits

4100 EDUCATIONAL AFFILIATIONS

4110 National Educational Affiliations
4111 AACJC--American Assn. of Community and Junior Colleges
4112 NCHEMS-National Center for Higher Education Management Systems
4113 American Association of University Administrators
4114 National Council of Instructional Administrators

4120 Regional Educational Affiliations
4121 SACS--Southern Association of Colleges and Schools
4122 SREB--Southern Regional Education Board
4123 Southern Association of Community and Junior Colleges
4124 GRICC--Gulf Regional Interstate Collegiate Consortium

4130 Local Educational Affiliations
4131 Our Lady of Holy Cross College
4132 Southern University
4133 Loyola University
4134 Jefferson Parish School Board
4135 Orleans Parish School Board
4136 Regional Vocational Institute
4137 YMCA School of Commerce

4140 External Programs at Delgado
4141 LSU Extension Program

4200 COMMUNITY RELATIONS/AFFILIATIONS

4210 State and Local Government
4211 Orleans Parish
4212 Jefferson Parish
4213 St. Bernard Parish

4220 Civic Associations
4221 Chamber of Commerce
4222 NOMA--New Orleans Museum of Art

4300 PUBLIC AFFAIRS

4210 College Functions and Ceremonies
4211-9 (Reserved for Assignment to Specific Functions)

4320 Release of Information
4321 Newspaper/Magazines New Releases
4322 Radio/TV Releases

4330 Speeches and Speakers
4331 Background Speech Material

4340 Exhibits
4341 Recruiting Exhibits

4350 College Publications
4351 On-the-Scene
4352 Calendar of Events

4360 Conferences/Conventions/Meetings
4361-9 (Reserved for Assignment to Specific Events)

4370 Visitors

5000 FACILITY PLANNING AND APPROVAL

5010 Master Plans
5011 Facility Requirements Determination
5012 Architect Selection Board

5100 REAL PROPERTY AND FACILITIES

5110 Land and Improvements
5111 Acquisition
5112 Utilization and Management
5113 Transfer or Disposal

5120 Construction of Facilities
5121 General
5122 Criteria and Standards
5123 Design and Engineering
5124 Cost Estimation
5125 Inspection, Supervision, and Acceptance

5130 Maintenance, Repair, and Operation of Facilities
5131 General
5132 Inspections
5133 Grounds and Appurtenances
5134 Utility Systems
5135 Refuse Collection and Disposal
5136 Fire Protection and Fire Fighting
5137 Plant Support Services

5200 FACILITY MANAGEMENT

5201 General

5210 City Park Campus
5211 Bldg. 1 Renovations
5212 Administration Building

5220 West Bank Campus

5230 East Campus Facilities

5240 Jefferson Parish Facilities

5250 St. Tammany Parish Facilities

5300 FACILITY CONTRACTS AND LEASES

6000 INSTITUTIONAL PROGRAMS

6010 General

6100 REHABILITATION CENTER

6110 General

6200 REGIONAL CENTER FOR THE DEAF

6210 General

6300 RESEARCH CONTRACTS AND GRANTS

6301 General Information
6302 Proposal Source Materials
6303 Potential Funding Sources
6304 Potential Areas for Proposal Development

6310 Grants/Proposals Being Developed
6311-9 (Reserved for Assignment to New Proposals)

6320 Active Grants/Contracts
6321 Deaf Program
6322 Library
6323 Veterans Affairs
6324 Interpreter Training
6325-9 (Reserved for Assignment to Approved Grants)

6330 Grant Training Activities/Workshops
6331 PIPs Program

7000 CAMPUS MANAGEMENT/CITY PARK CAMPUS

7001 General
7002 Scheduling of Classrooms
7003 Divisional Meetings

7010 Continuing Education
7011 Off-Campus Programs
7012 Apprenticeship Program
7013 High School Co-Op Program
7014 College Co-Op Program
7015 Business and Industry

7020 Community Services
7021 Community Services Programs
7022-8 (Reserved for Assignment to Specific Programs)
7029 Life Experience Assessment Program

7030 City Park Campus Library

7100 BUSINESS STUDIES

7110 Business Administration
7111 Accounting
7112 Banking
7113 Data Processing
7114 Gen. Business and Business Training
7115 Insurance
7116 Mid-Management
7117 Real Estate

7120 Savings and Loan Administration

7130 Secretarial and Office Careers
7131 Secretarial Careers
7132 Clerical Procedures Certificate

7200 DEVELOPMENTAL STUDIES AND HUMAN DEVELOPMENT

7210 Developmental English
7220 Developmental Mathematics
7230 Developmental Reading
7240 Developmental Speech
7250 English as a Second Language
7260 Human Development

7300 ENGINEERING AND INDUSTRIAL TECHNOLOGY

7310 Architectural Engineering Technology
7320 Civil Engineering Technology
7330 Electrical Engineering Technology
7340 Electronics Services Technology
7350 Engineering Graphics Technology
7360 Fire Protection Technology
7361 Marine Firefighting
7370 Industrial Engineering Technology
7380 Mechanical Engineering Technology
7390 Petroleum Engineering Technology

7400 FINE ARTS AND APPLIED ARTS

7410 Fine Arts
7411 Art
7412 Theatre
7413 Dance
7414 Philosophy

7420 Applied Arts
7421 Advertising Art
7422 Commercial Art
7423 Graphic Arts Technology
7424 Printing Technology
7425 Interior Design
7430 Music

7500 HUMANITIES

7510 Language Arts
7511 English Composition, Literature
7512 French, German, Spanish
7513 Speech and Journalism

7520 Manual Communications
7521 Interpreter Training

7530 Social Sciences
7531 Anthropology
7532 Geography and History
7533 Psychology
7534 Social Sciences
7535 Sociology

7540 Education
7541 Early Childhood Education
7542 Physical Education

7550 Criminal Justice
7551 Corrections
7552 Law Enforcement

7600 MATHEMATICS AND TECHNOLOGY

7610 Computer Science Technology

7620 Aircraft Maintenance

7630 Metal Work
7631 Machinist Technology
7632 Welding Technology

7640 Motor Vehicle Technology

7660 Mathematics

7700 SAFETY AND BUILDING TECHNOLOGY

7710 Construction Technology
7711 Air Conditioning and Refrigeration
7712 Cabinet Making
7713 Carpentry
7714 Electrical Construction
7715 Heating and Ventilation
7716 Solar Energy

7720 Occupational Safety and Health

7800 SCIENCE AND ALLIED HEALTH

7810 Science Program
7811 Biology
7812 Chemistry
7813 General Science
7814 Physics

7820 Allied Health
7821 Radiologic Technology
7822 Funeral Service Education
7823 Respiratory Care Technology
7824 Food Technology
7825 Urban Pests Management
7826 Water and Wastewater Technology

7830 Barbering and Hair Design

7840 Horticulture

8000 CAMPUS MANAGEMENT/WEST BANK CAMPUS

8001 General

8010 Scheduling of Classrooms

8020 Divisional Meetings

8100 BUSINESS STUDIES

8200 COMMUNICATIONS AND GENERAL ARTS

8300 MATH, SCIENCE AND TECHNOLOGY

8400 CONTINUING EDUCATION

8410 Cooperative Education Programs

8500 COMMUNITY SERVICES

8600 WEST BANK CAMPUS LIBRARY

DELGADO COMMUNITY COLLEGE 1921

DELGADO COLLEGE
MANAGEMENT INSTRUCTION

NUMBER:
EFFECTIVE DATE:
Originating Organization:

SUBJECT: FORMAT FOR DELGADO COLLEGE MANAGEMENT INSTRUCTION

REFERENCE: (List all references here)

1. PURPOSE

To establish the format and procedures for publication of Delgado College Management Instructions (DCI's).

2. DEFINITION

Delgado College Management Instructions (DCI's) will be used to publish policy statements, delegations of authority, program or institutional management decisions; general guidelines or procedures; other college management information of a continuing nature; and formal agreements containing material within the above definitions.

3. NUMBERING

Management Instructions numbers will consist of the identifying prefix (DCI), a 4-digit subject classification number, a decimal point, and a consecutive number assigned by the Delgado College Issuance Control Officer. The number will be assigned immediately prior to printing and will appear in the upper-right-corner of odd-numbered pages and the upper-left corner of even-numbered pages.

4. FORMAT

a. General

This Annex illustrates the layout and paragraphing. Page size will be 8½ x 11 inches with the first page on the Management Instruction Form, second and succeeding pages on plain bond, headed to show the instruction number and effective date; with page numbers at the bottom center of the second and succeeding pages.

b. Content

Delgado College Management Instructions should be organized in a systematic manner. References will be listed immediately below the subject and will be used only when they improve understanding or when they cite higher directives that require or govern the instruction. Applicable paragraph headings will be selected from and arranged in the order listed below. Additional titles may be included to fit the needs of a particular instruction.

(1) Purpose—the primary reason for the instruction.

(2) Scope—organizations, people, or items affected.

(3) Policy—general policy statements, when required.

(4) Definitions—used to give specific meaning to a work, term, or phrase as used in the instruction.

(5) Background—if needed for understanding.

(6) General Provisions—includes information required for clarity but which will not fit under other headings.

(7) Responsibilities and Procedures—specifies who does what, when, how, and where. Separation of these headings may be necessary for clarity.

(8) Cancellation—previous issuances being superseded.

(9) Signature—type name and title of signing official to the right of the center of the last page, six lines below last paragraph.

(10) Enclosures—annexes and attachments.

(11) Distribution—will be shown in the lower-left corner, two lines below enclosure notation or signature block. Normally, this will consist of a distribution code. (See DCI 1120.2).

c. Paragraphing

Major paragraphs will use arabic numbers, upper-case letters, and will be underlined. Headings for subparagraphs will be capitalized and underlined, and will follow the numbering and lettering pattern below:

1. MAJOR PARAGRAPH

a. First subparagraph

(1) Second subparagraph

(a) Third subparagraph

1. Fourth subparagraph

a. Fifth subparagraph

d. Margins

A minimum left margin of 3/4" should be provided and a right margin of 1/2 inch.

5. CHANGES OR REVISIONS

a. Changes

Changes issued to amend portions of an instruction or to add supplementary material will be issued as page changes and will be identified by the letters Ch and a sequential number after the basic number on the pages changed; however, if a reissued page is printed on both sides and only one side is being changed, the side that is not changed will retain its original date and identification even though it is reprinted. Changes will be processed for publication in the same manner as the original instruction.

b. Revisions

Revisions will be made when a substantial change is required and will be assigned the same subject and number as the basic instruction with a letter of the alphabet following the classification number (first revision A, the second B, etc.). The new date of issue will be used and revisions will be processed in the same manner as the original instruction.

c. Cancellation

Obsolete instructions will be cancelled through issuance of a Delgado College Announcement (DCA).

6. FILING

Delgado College Management Instructions should be filed by subject classification in consecutive number sequence in a three-ring binder.

7. PROCESSING FOR PUBLICATION

a. Originating Organizations will:

(1) Coordinate proposed issuances with other offices having an official interest in the subject.

(2) Obtain instruction number from Delgado College Management Issuance Control Officer and prepare final copy for signature of President or Vice President for Academic Affairs and Provost.

b. Delgado College Management Issuance Control Officer will:

(1) Assure proper format and coordination, assign instruction numbers, have instruction signed, reproduced and distributed.

DCI 1220.1

November 1, 1979

ANNEX B

7. b. (2) Maintain extra copy stock of management issuances.

(3) Maintain and issue current index of Delgado College management issuances.

(Signature block of authorizing official)

Enclosure:
(List Annexes or Attachments)

Distribution:
(Delgado College SDL codes or other addressees)

DELGADO COLLEGE

NUMBER:	
EFFECTIVE DATE:	
EXPIRATION DATE:	
ORIGINATING ORGANIZATION:	

MANAGEMENT ANNOUNCEMENT

SUBJECT: FORMAT FOR DELGADO COLLEGE MANAGEMENT ANNOUNCEMENT (DCA)

1. PURPOSE

To establish format and procedures for publication of Delgado College Management Announcements(DCA's).

2. DEFINITION

Delgado College Management Announcements will be used to publish management information and procedures of a temporary or one-time nature, and issuances subject to frequent change, such as board or committee appointments. DCA's will not be used to revise permanent type issuances; however, announcements of provisions of new or revised instructions may be included pending formal publication of DCI's.

3. NUMBERING

Delgado College Management Announcement numbers will consist of the prefix DCA and a 4-digit subject classification number. Management Announcements will also carry a control number, consisting of consecutive numbers beginning the first of each year with number 1 (1-79, 2-79, etc.).

4. EXPIRATION DATE

Expiration date will be shown in the appropriate block. Normally, expiration dates will be within six months to one year from date of issue; however, this date can be later depending upon the purpose of the announcement.

5. FORMAT

a. Arrangement of paragraphs, headings, margins, placement of signature, enclosure notation, and distribution codes will generally follow the format of DCI's (Delgado College Management Instructions (Annex B); however, brief DCA's of four paragraphs or less may be prepared without paragraph headings.

b. Page size will be 8½ x 11 inches, on blue paper, first page on Delgado College Management Announcement form, with second and succeeding pages on plain bond, headed to show announcement number and date.

6. CHANGES OR REVISIONS

When a substantial change to an announcement is required, such information will be issued as a new announcement, with a new expiration date. The new announcement will be assigned the same subject title and number as the basic DCA with a letter of the alphabet following the classification number (first revision A, the second B, etc.).

7. FILING

DCA's should be interfiled with other Delgado College Management Instructions by subject classification number in a three-ring binder.

8. PROCESSING FOR PUBLICATION

Delgado College Management Announcements will be prepared, coordinated, and distributed in the same manner as Delgado College Management Instructions.

(Signature block of authorizing official)

Distribution:
(Delgado College SDL Codes
or other addressees)

DELGADO COMMUNITY COLLEGE 1921

DELGADO COLLEGE

MANAGEMENT DELEGATION

NUMBER:

EFFECTIVE DATE:

Originating Organization:

SUBJECT: PUBLICATION OF DELGADO COLLEGE MANAGEMENT DELEGATION

1. PURPOSE

To establish the special format and procedures for publication of Delgado College Management Instructions (DCI's) which delegate management authority.

2. DEFINITION

a. The DCI will be used for the delegation or redelegation of power and authority by Delgado College officials pursuant to law, Board of Trustees for State Colleges and Universities directives, or administrative decision. (A delegation is the conveyance of a given right to act, or refrain from acting, by an official in whom it is vested to another official.)

b. The DCI will not be used for:

(1) Delegation of specific power and authority inherent in functional assignments (Charter).

(2) Assignment of responsibilities that do not include authority (e.g. compiling reports; reviewing, coordinating and processing actions; providing advice; and similar day-to-day work).

3. PROCESSING FOR PUBLICATION

Management Delegations will be prepared, coordinated, and distributed in the same manner as Delgado College Management Instructions (DCI's).

4. FORMAT

The format and numbering of management delegations will follow that prescribed for Management Instructions with specific paragraphs and captions as provided below. All delegations of authority will be printed on green paper.

a. Subject: The subject will start with the words "POWER AND AUTHORITY..." The remainder of the subject will briefly describe the substance of the specific delegation.

b. Delegation: The first paragraph will consist of the delegation. (When this is a redelegation from higher authority, the paragraph should be entitled Redelegation.) It will include all applicable

4. b. substantive conditions and limitations. Delegations should be to officials by title rather than individual name where possible. If certain conditions must be met prior to making a redelegation, the redelegation must reveal clearly that such conditions have been met. When delegation is to one official, state that official's title first and underscore it. When authority is delegated to more than one official, use an enumerated listing of titles after the statement making the delegation.

c. Power to Redelegate: The second paragraph entitled Redelegation will state whether all or part of the authority may be redelegated. (When the first paragraph is a redelegation this paragraph should be entitled Further Redelegation.) If redelegation is not permitted, this paragraph will state, "No redelegation (or further redelegation) authorized." If redelegation is permitted, this paragraph will specify:

(1) Requirements for approval of higher officials.

(2) To whom it may be redelegated in terms of the number or types of officials.

(3) Whether it is with or without power of further redelegation.

(4) Whether it is subject to the same conditions and limitations as the basic delegation or different conditions and limitations.

d. Reporting: Since the recipient of authority shares responsibility and does not become an independent agent, that person has the duty to keep the official from whom authority is received informed of significant actions and consequences—normal and abnormal or adverse. The following language will be used in this paragraph: "The (insert title(s) of official(s) receiving delegation) to whom authority is delegated (or redelegated) shall ensure that feedback is provided to the College President (or other official making the delegation) through official channels to keep the President fully and currently informed of significant actions, problems, or other matters of substance related to the exercise of the authority delegated hereunder."

e. Basic Authority: The fourth paragraph will provide a reference to the source of basic power and authority being delegated or redelegated.

f. Cancellation:

(1) When possible, the specific reference containing prior delegation or redelegation should be cancelled.

(2) If the existence of prior delegation is unknown or undocumented, the statement, "Prior delegations or redelegations on the same subject are cancelled," may be used.

5. CHANGES OR REVISIONS

Changes to issuances delegating management authority (other than editorial changes) will not be made except by a complete revision and may be completely cancelled by issuance of a Delgado College Management Announcement.

6. FILING

Management delegations should be interfiled with other college-wide issuances by subject classification number.

(Signature Block of
Authorizing Official)

Distribution:
(SDL codes or other addressees)

November 1, 1979

DCI 1220.1
ANNEX E 81

DELGADO COMMUNITY COLLEGE 1921

DELGADO COLLEGE
MANAGEMENT INSTRUCTION

NUMBER:
EFFECTIVE DATE:
Originating Organization:

SUBJECT: PUBLICATION OF DELGADO COLLEGE MANUALS

1. PURPOSE

To establish the procedures for publication of Delgado College Manuals (DM).

2. DEFINITION

Manuals will be used to issue a large amount of specialized subject matter, proceduralized information of a continuing nature which is best published in manual form, or to group for ease of reference a number of issuances in the same subject matter area.

3. AUTHORIZATION

Manuals must be approved by the Vice President for Academic Affairs and Provost and the President. The vice president, assistant vice president, or executive dean of the requesting organization should submit a memorandum, through the Issuance Control Officer, requesting authorization for the proposed manual. Request will include:

a. Title of proposed manual

b. Purpose and outline of manual contents (Attach draft of proposed preface page.)

c. Planned format

d. Approximate number of pages

e. Distribution

f. Office responsible for issuance

4. PROCESSING FOR PUBLICATION

a. The authorized organization is responsible for preparing drafts, staffing, and processing final copy of the manual.

b. Reviewing organizations will submit comments or concurrences within the established time limit. Comments will be considered by the originator and issuances will be revised as necessary. When major differences exist, these will be resolved prior to publication and such differences will be included in the record case file.

4. c. Distribution information will be shown in the lower-left corner of signature page and normally will be in the form of a distribution code. Two copies of each manual and any change will be forwarded to the Issuance Control Officer.

d. Record case files will be retained by issuing organization.

e. Originating organization will maintain extra copy stock of manuals.

5. FORMAT

a. Each manual will contain a preface signed by the approving official and will show purpose, applicability, and distribution.

b. Manuals will be on 8½ x 11 inch plain bond, written in a clear and concise manner; paragraph headings, when used, should follow the format for Management Instructions (Annex B); and the internal format may vary according to subject content.

6. NUMBERING

Manual numbers will consist of the identifying prefix DM, a 4-digit subject classification number, a decimal point, and a consecutive number assigned immediately prior to printing. The number will appear, as a minimum, in the upper-right corner of the cover and preface page and may be included on each page, if appropriate.

7. CHANGES OR REVISIONS

Changes or revisions will follow procedure prescribed for Management Instructions (Annex B).

8. FILING

Manuals may be interfiled with other issuances or may be maintained separately for independent use depending on size and purpose.

9. COVER

The cover will carry the manual number in the upper-right corner, the title of the manual, and the name of the originating organization.

November 1, 1979

DCI 1220.1
ANNEX F 83

DELGADO COMMUNITY COLLEGE 1921

DELGADO COLLEGE
MANAGEMENT INSTRUCTION

NUMBER:

EFFECTIVE DATE:

Originating Organization:

SUBJECT: PUBLICATION OF DELGADO COLLEGE CHARTERS

1. PURPOSE

To establish the procedures for publication of Delgado College Charters.

2. DEFINITION

Charters will be used primarily to assign functional or operational responsibility, and to establish organizational structure and permanent college committees, boards, and panels.

3. GENERAL PROVISIONS

a. Organizational Manual

Charters assigning functional responsibilities and authorities and establishing organizational structure will be issued for each major office/division of the college. Collectively these charters will become the Delgado College Organizational Manual and will be published in accordance with the procedures and numbering system prescribed for Delgado manuals (DM's). In addition to the management issuance number, a charter number consistent with the organizational code will be assigned to the chartered office/division.

b. Standing Committees, Boards, Panels

Charters will be the medium for establishing permanent college committees, boards, and panels. Publication of these charters will follow the procedures and numbering system prescribed for management instructions (DCI's). Membership appointments to chartered committees, boards, and panels as well as appointments to special, ad hoc committees will be accomplished through issuance of a management announcement (DCA).

4. FORMAT

a. Organizational Manual

Each charter assigning functional responsibilities and authorities will contain the following paragraphs and captions:

4. a. (1) Functions: State the overall functions assigned to the chartered office/division in broad terms.

(2) Responsibilities: List the major responsibilities required to accomplish assigned functions.

(3) Authority: Delegate the authority necessary to carry out the responsibilities of the chartered office/division.

(4) Management Relationships: Include the type position; e.g. line or staff; reporting relationships within the college organization; and interface relationships with governmental, educational, and community groups required to accomplish functional responsibilities.

b. Standing Committees, Boards, Panels

(1) Functions: Include the overall function as well as areas of concentration required to fulfill this functional assignment.

(2) Membership: State committee composition; i.e. faculty members, administrators, students, etc., and ratio and/or number of members in each category. (Note: appointments of individuals to serve on these committees will be made by separate management announcements.)

(3) Term of Membership: State the beginning date and length of term of membership.

(4) Meetings: Include minimum meeting requirements as well as information concerning documentation of meetings.

(5) Reports: Include reporting requirements; i.e., type, frequency, and distribution of reports, and any special instructions committee members should adhere to in complying with this reporting requirement.

DELGADO COMMUNITY COLLEGE	NUMBER: DCI 1210.1B
	EFFECTIVE DATE: December 2, 1985
	ORIGINATING ORGANIZATION: AA01

MANAGEMENT INSTRUCTION

SUBJECT: DELGADO'S PLANNING SYSTEM

1. PURPOSE

To publish the Delgado Planning System which provides for establishing Institutional Priorities; developing and budgeting for System and Campus Goals, Objectives, and Activities; and a monitoring system for ensuring planned goals and objectives are met.

2. SCOPE AND APPLICABILITY

This issuance applies to all organizational units of the Delgado Community College System.

3. POLICY

a. President and Executive Council will develop Institutional Priorities that will ensure, within the scope of its mission and available resources, Delgado is meeting the educational needs of the community in an effective manner.

b. Vice Presidents and Campus Deans will develop, budget, implement and monitor Goals, Objectives, and Activities for their areas of responsibility to support Institutional Priorities.

4. BACKGROUND

Because of the size and diversity of the student body and the broad range of traditional and non-traditional courses and programs offered at Delgado's two campuses and off-site locations, a systems approach is required for effective college-wide management. A comprehensive planning system was developed and implemented under a Title III grant during the period October 1982 through September 1985. Because of the planning system's importance to Delgado's overall management, it is under continuous review and changes are made as required to maintain it as a viable part of Delgado's management.

5. ASSUMPTIONS

Delgado Planning System is based on the following assumptions:

a. That planning is a continuous year-round activity;

b. That the President and Executive Council are actively involved in the planning process;

c. That input from all operating levels and external sources is used in developing System and Campus Goals, Objectives, and Activities; and

d. That budgeting is an integral part of the planning process.

6. COMPONENTS OF THE PLANNING SYSTEM

a. Institutional Priorities

Institutional Priorities are general, global statements that embody the College's overall responsibilities in fulfilling its mission and educational philosophy. With the exception of events of significant magnitude which may be added as Priorities, such as the SACS Accreditation Review, only minor changes will be made in the Institutional Priorities unless the mission of the College is changed.

b. System and Campus Goals

System and Campus Goals are specific statements reflecting the areas to receive attention by the major operating units and provide the overall structure for developing Objectives and Activities.

c. System and Campus Objectives

System and Campus Objectives are more detailed statements that are designed to accomplish System and Campus Goals and are the basis for the development of Activities.

c. System and Campus Activities

System and Campus Activities are measurable tasks that support the Goals and Objectives. They are planned, budgeted, and implemented by the operating units.

d. Status Reports

The effectiveness of the planning system is best measured by the success of each major operating unit in achieving its Goals and Objectives. Therefore, monitoring is an important component of the planning system.

Campus Deans and Vice Presidents will maintain on their word processors, on a continuing basis, the status of planned Activities. Status Reports follow the same format as End-of-Year Reports and include information on completion of Activities and milestones as well as problems encountered that prevent or impede the completion of Activities. Copies of Status Reports will be furnished the Vice President for Academic on November 1 and February 1 of each year.

e. End-of-Year Reports

End-of-Year Reports are submitted by operating units to appropriate Campus Dean or Vice President. The purpose of these reports is to determine the overall effectiveness of operating units in accomplishing their planned Objectives and Activities.

Information in the operating units' End-of-Year Reports is summarized by the Vice Presidents and Campus Deans during their End-of-Year presentations to the President and Executive Council at the Summer Retreat.

Format for End-of-Year Reports is contained in Attachment A.

7. INTERRELATIONSHIP WITH STAFF/FACULTY DEVELOPMENT AND EVALUATION

The overall image of the College and the important role it plays in the community is measured by the sum of all contributions made by Delgado employees. The more professional Delgado employees are in their jobs and the more active they are in community projects and events, the more positive Delgado's image. Therefore, while staff development and evaluation are not part of the planning system per se, there is a definite interrelationship.

Under the Performance Evaluation System, each employee completes a Plan of Action identifying an activity(ties) he will undertake, over and above his job responsibilities, that will contribute to the operating unit's Objectives and Activities. At the end of the year, these accomplishments will be considered in the employee's performance evaluation ratings.

Staff development activities recommended in Status Reports or End-of-Year Reports will be given serious consideration when formulating the institutional Staff Development Program.

8. TIMETABLE

To keep the elements of the planning system in proper prospective, it must be understood that the College is working concurrently on two sets of planning activities; i.e. implementation of current year's activities, while developing and budgeting for next year's activities. For this reason, the Planning System Timetable has been divided into the following two sections.

Implementation of Current Year's Activities

August 15	Vice President for Business Affairs distributes approved budget for academic year to budget heads.
September 15	Faculty and staff members submit Plans of Action (part of Performance Evaluation System) to supervisors.
November 1 and February 1	Vice Presidents and Campus Deans submit Status Reports on current activities to Vice President for Academic Affairs.
May 1	(Summer Retreat) Vice Presidents and Campus Deans make End-of-Year Presentations to President and Executive Council.
June 1	Vice Presidents and Campus Deans submit End-of-Year Reports to Vice President for Institutional Programs.

Development of Next Year's Activities.

November 1	President and Vice President for Academic Affairs issue Institutional Priorities for the following academic year.
	Vice Presidents and Campus Deans
January 15	Develop Goals and Objectives for their operating units, and
February 15	Submit these Goals and Objectives to Vice President for Academic Affairs.
March 1	Vice President for Academic Affairs returns Goals and Objectives with recommended changes to Vice Presidents and Campus Deans.
April 1	Vice Presidents and Campus Deans submit to Vice President for Academic Affairs proposed Activities with budgets to support approved Goals and Objectives.
May 1	(Summer Retreat) President and Executive Council review and approve Activities and budgets for next academic year and submit them to Vice President for Business Affairs.
June 1	Budget development process begins.
June 15	Finalized budget reviewed by Executive Council.
July 1	Delgado's budget submitted to State of Louisiana, Division of Administration.

9. RESPONSIBILITIES AND PROCEDURES

a. The President and Vice President for Academic Affairs will take the lead role in providing the leadership required to implement the Delgado Planning System.

b. Vice Presidents and Campus Deans will:

(1) Develop Goals and Objectives that will ensure Institutional Priorities are met;

(2) Develop and budget for Activities required to implement approved Goals and Objectives;

(3) Implement, monitor, and report progress on approved Objectives and Activities.

c. Each employee will:

(1) Be familiar with the Institutional Priorities and System/Campus Goals, Objectives, Activities;

(2) Provide input to the operating unit in developing System and Campus Activities; and

(3) Perform specific task(s) on an individual basis that will contribute to the operating unit achieving its planned Objectives and Activities.

10. CANCELLATION

DCI 1210.1A, Delgado's Planning System, dated August 12, 1985.

Harry J. Boyer
President

Attachment:
A - Format for End-of-Year Report

Distribution:
SDL A, B, C, D, E, F

cc: Board of Regents
Board of Trustees
President, Faculty Senate

FORMAT

END-OF-YEAR REPORT
CAMPUS - SYSTEMS OFFICE
DIVISION/OPERATING UNIT

_____
Date

PART I

I. INSTITUTIONAL PRIORITY

1. SYSTEM/CAMPUS OBJECTIVE

1. SYSTEM/CAMPUS ACTIVITY

Evaluative Comments:

2. SYSTEM/CAMPUS ACTIVITY

Evaluative Comments:

II. INSTITUTIONAL PRIORITY

1. SYSTEM/CAMPUS OBJECTIVE

1. SYSTEM/CAMPUS ACTIVITY

Evaluative Comments:

III. (Etc.....)

Include those Institutional Priorities and System/Campus Objectives which are being supported by System/Campus Activities.

Under Evaluative Comments give a status report of the Activity. Incluce progress made toward accomplishing the activity as well as any problems or obstacles encountered and corrective action taken to modify, defer, or eliminate the Activity.

PART II

Recommendations for System/Campus Objectives and Activities for the next academic year.

PART III

List all pertinent statistics:

Students	Special Programs	Newspaper Articles
SCH's	Parttime Faculty	Awards
Sections	Fulltime Faculty	

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